



Who's Hawaii's Customer?

Presented by:

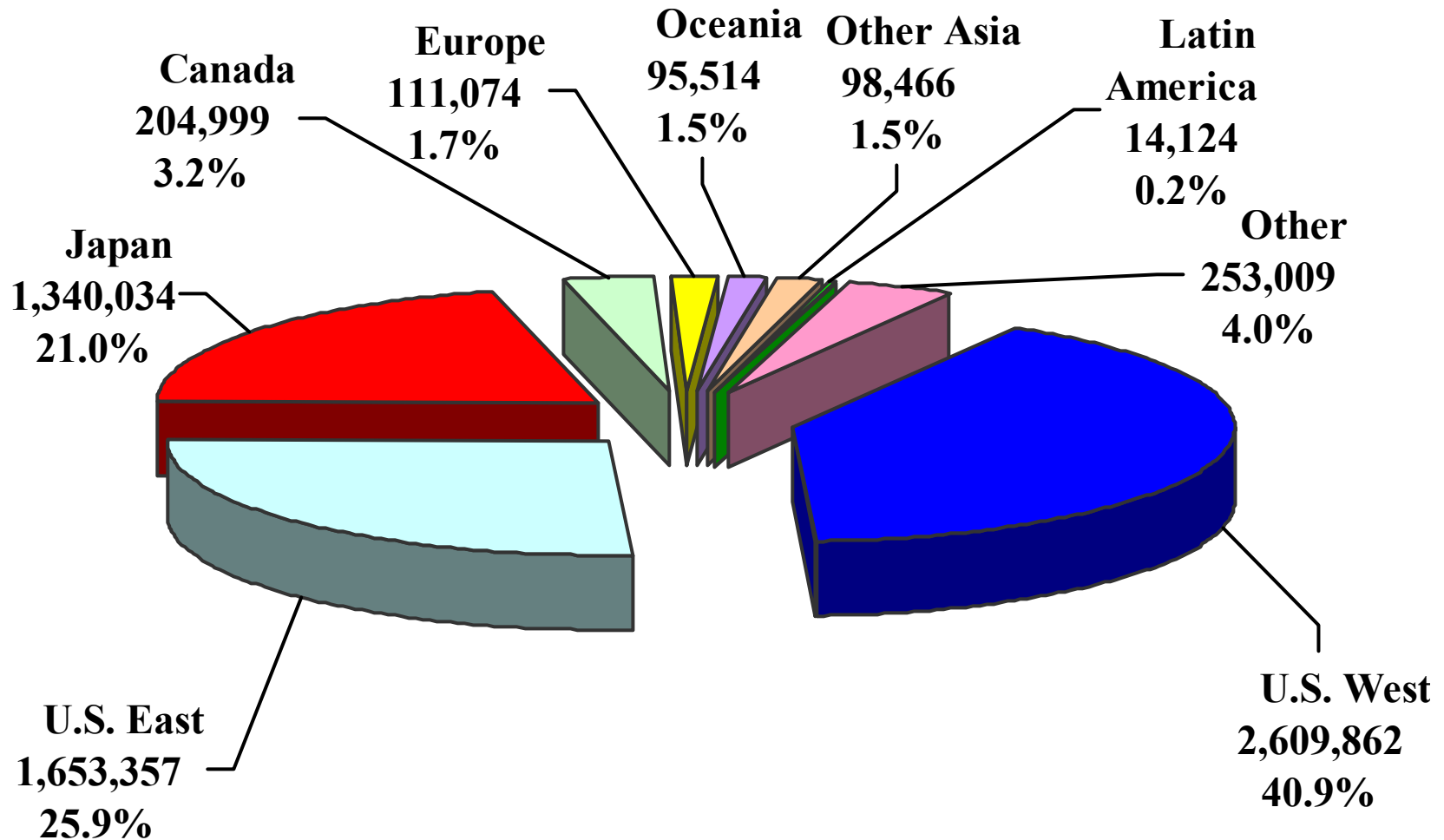
Dr. Pearl Imada Iboshi

Department of Business, Economic Development & Tourism

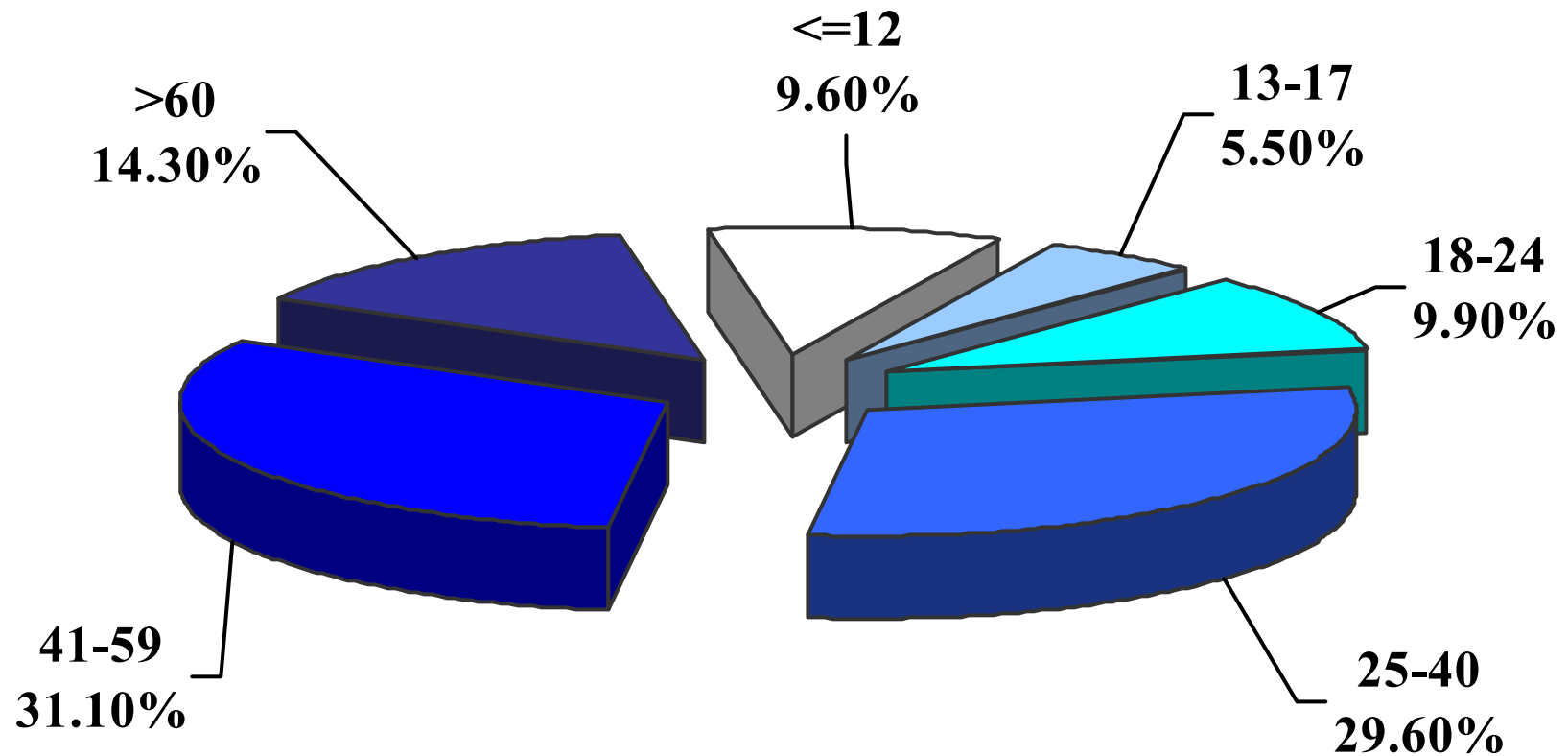
2004 Hawaii Tourism Conference

September 13, 2004

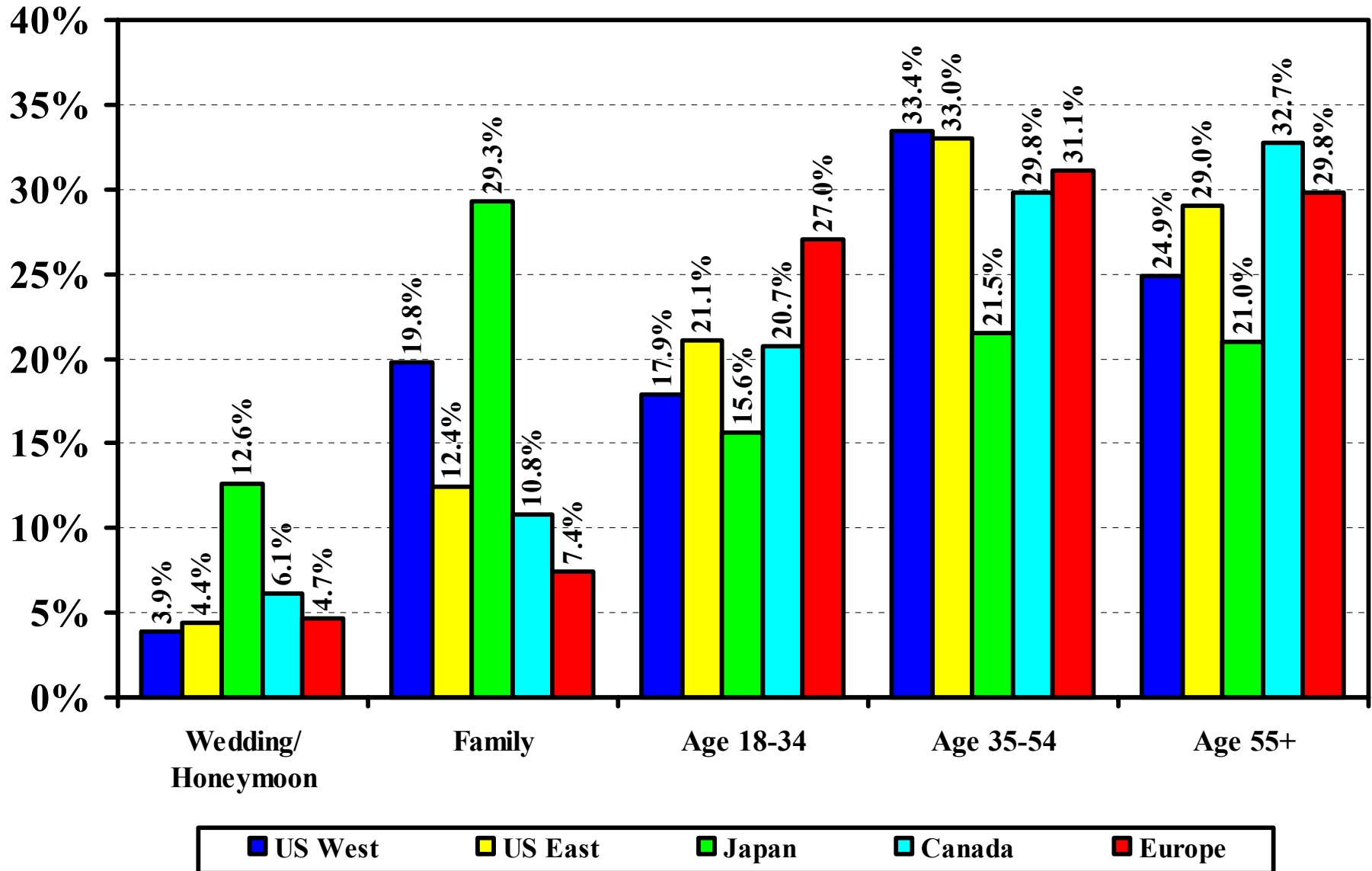
Hawaii's Visitors Arrivals by MMA, 2003



Hawaii's Visitors by Age, 2003

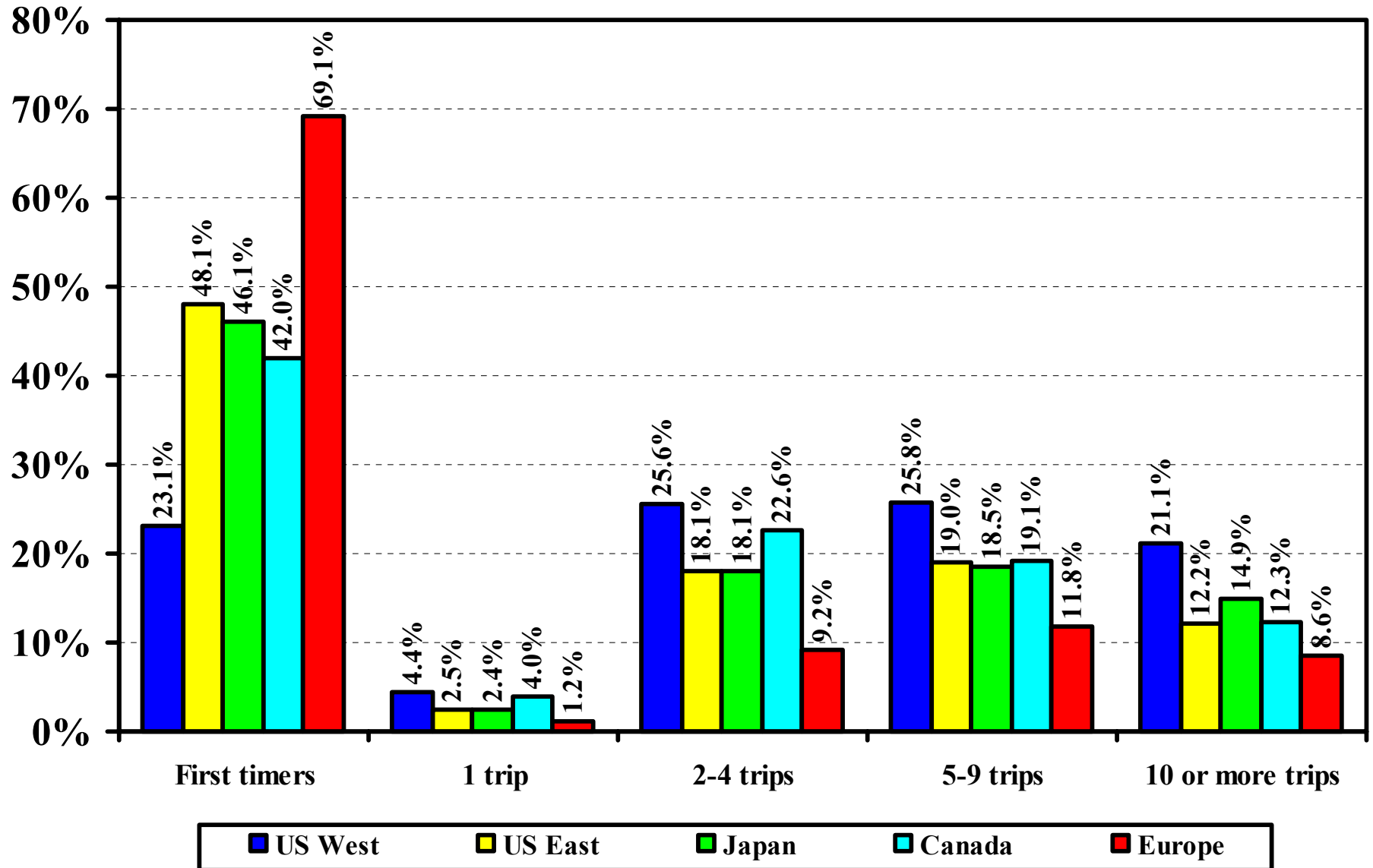


Hawaii's Visitors by MMA and Life Stage, 2003

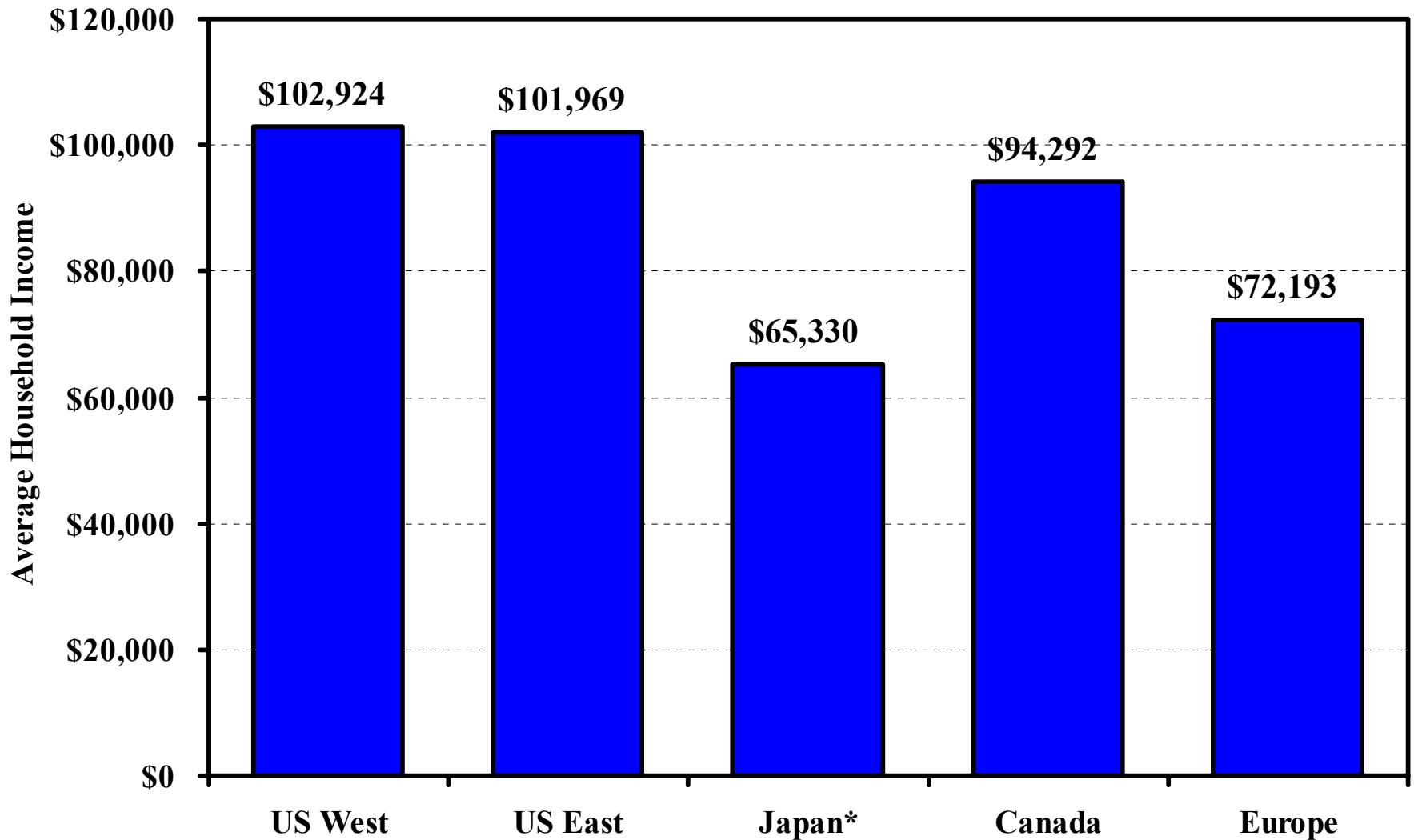


Hawaii's Visitors by MMA and Frequency of Visitation

(number of additional trips to Hawaii in last 3 years)

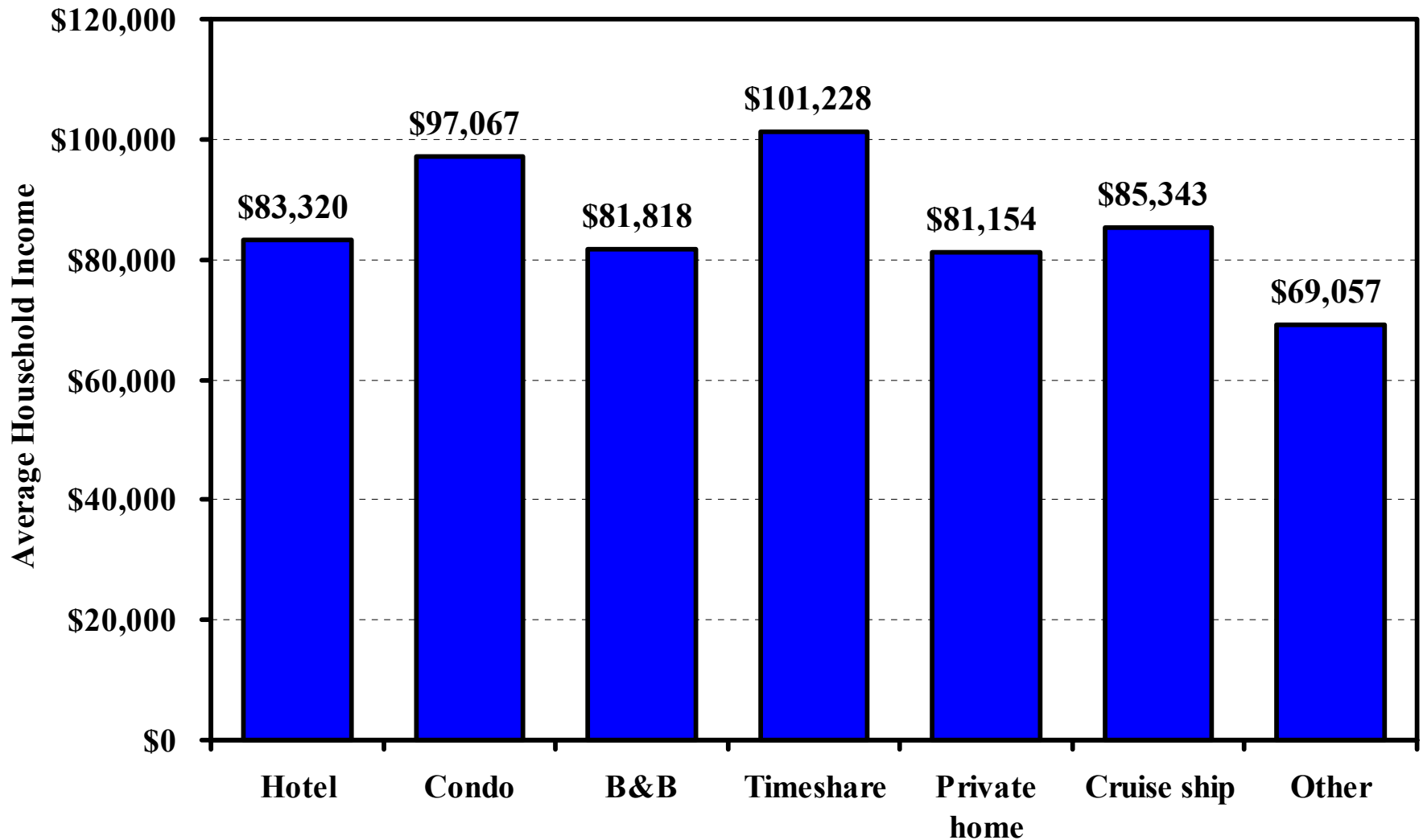


Average Household Income by MMA, 2003



*one U.S. dollar = 115.91 yen

Average Household Income by Accommodation, 2003

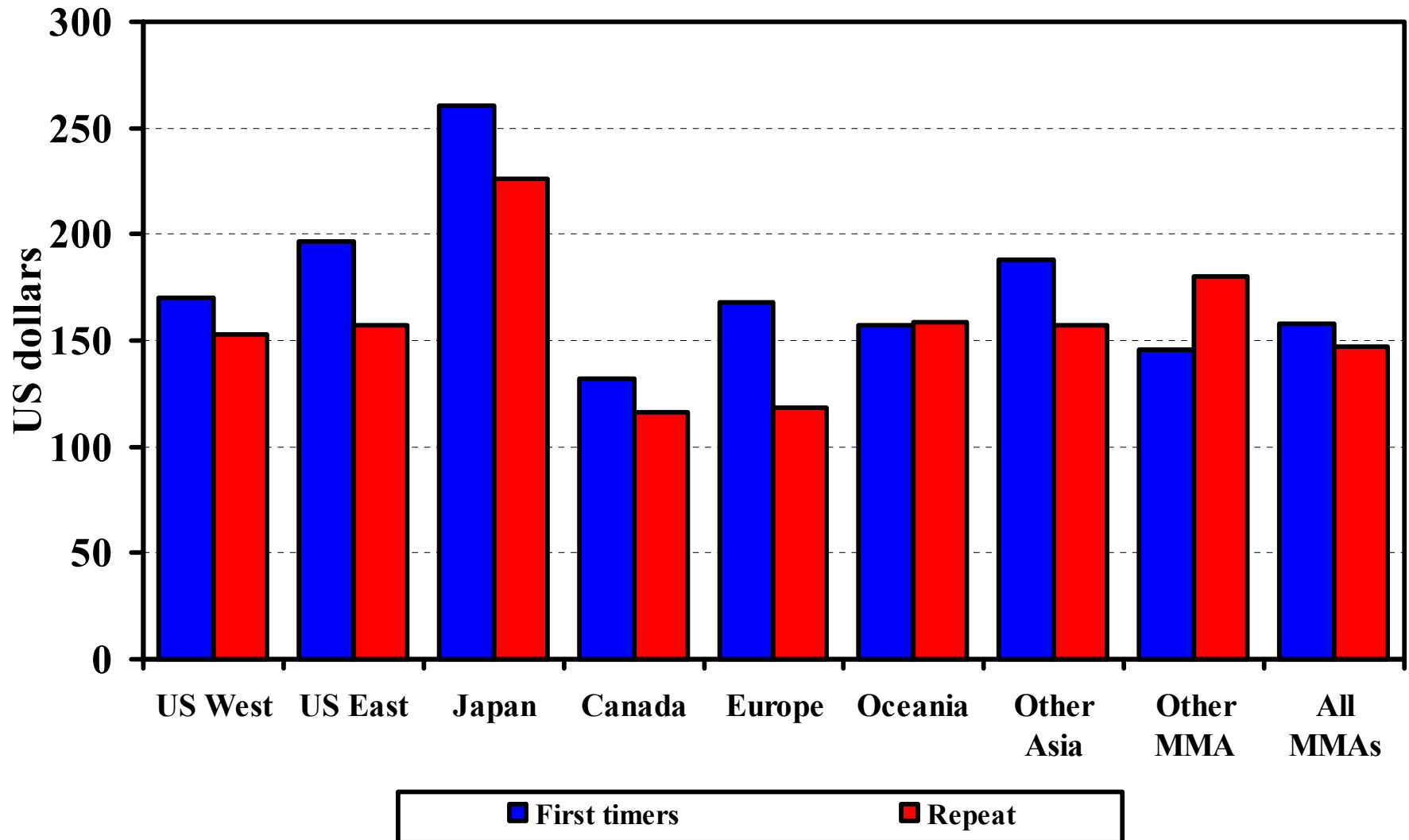


Average Household Income by MMA and Various Categories

MMA	First timers	Repeat	Wedding/ Honeymoon	Family	Age 18-34	Age 35-54	Golf
US West	\$83,605	\$108,761	\$77,286	\$120,418	\$71,667	\$112,590	\$130,761
US East	\$93,295	\$109,931	\$95,865	\$117,077	\$84,912	\$112,202	\$128,655
Japan*	\$54,349	\$71,212	\$47,572	\$74,703	\$39,242	\$75,437	\$89,759
Canada	\$86,688	\$100,537	\$87,361	\$110,872	\$78,600	\$109,287	\$125,919
Europe	\$69,271	\$78,200	\$75,409	\$94,352	\$61,136	\$80,378	\$102,140

*one U.S. dollar = 115.91 yen

Per Person Per Day Spending by MMA, 2003



Per Person Per Day Spending by Type of Travel, U.S. West

Expenditures	Oahu		Neighbor Island	
	First timers	Repeat	First timers	Repeat
All Food in Hawaii	32.3	33.1	32.2	30.5
Entertainment & Recreation	7.2	8.1	17.9	10.9
Transportation	16.1	11.8	18.2	15.8
Total Shopping	28.0	24.9	20.1	18.2
Lodging	42.7	48.6	78.9	71.7
All other	6.9	5.8	5.3	8.7
Total	133.3	132.3	172.6	155.6

Per Person Per Day Spending by Type of Travel, U.S. East

Expenditures	Oahu		Neighbor Island	
	First timers	Repeat	First timers	Repeat
All Food in Hawaii	32.8	32.7	41.7	31.6
Entertainment & Recreation	6.8	7.1	24.3	13.3
Transportation	11.2	11.4	18.4	16.6
Total Shopping	26.0	27.6	25.9	22.0
Lodging	44.4	48.5	85.5	67.8
All other	5.5	4.5	7.7	9.5
Total	126.6	131.8	203.6	160.8

Per Person Per Day Spending by MMA and Purpose of Trip, 2003

MMA	Honey- moon	Vacation	Conven- tion	Corp. mtg.	Incentive	Other business	Visit friends
US West	232.7	158.2	202.5	198.8	223.2	166.4	95.7
US East	252.3	170.7	223.4	180.0	297.4	165.5	104.8
Japan	332.7	220.4	201.1	247.1	238.5	214.3	141.1
Canada	160.0	120.9	165.7	186.4	144.2	127.7	58.2
All MMA	209.8	143.3	124.5	253.4	107.2	161.7	101.4

Per Person Per Day Spending by Type of Travel, U.S. West, U.S. East, and Japan

Expenditures	US West		US East		Japan	
	First timers	Repeat	First timers	Repeat	First timers	Repeat
All Food in Hawaii	32.2	30.7	40.9	31.8	42.0	40.8
Entertainment & Recreation	17.2	10.6	22.8	12.5	21.2	15.1
Transportation	18.1	15.3	17.8	15.9	12.6	12.5
Total Shopping	20.6	18.9	25.9	22.7	98.5	84.3
Lodging	76.7	69.1	81.8	65.2	65.9	58.2
All other	5.4	8.4	7.5	8.8	20.4	15.3
Total	170.2	153.1	196.7	156.9	260.6	226.3

Per Person Per Day Spending by Type of Accommodation

U.S. West

Expenditures	Hotel	Condo	B&B	Timeshare
All Food in Hawaii	41.3	27.2	28.3	28.7
Entertainment & Recreation	15.7	11.7	10.0	13.9
Transportation	19.5	15.9	17.9	15.1
Total Shopping	24.6	16.8	18.2	18.6
Lodging	109.2	74.4	52.7	26.4
All other	7.6	7.2	7.2	7.1
Total	217.9	153.3	134.3	109.8

Per Person Per Day Spending by Type of Accommodation

U.S. East

Expenditures	Hotel	Condo	B&B	Timeshare
All Food in Hawaii	45.2	29.7	32.4	30.7
Entertainment & Recreation	22.2	15.3	13.7	17.9
Transportation	19.3	15.9	17.2	16.5
Total Shopping	29.5	18.4	24.4	22.1
Lodging	99.8	74.5	50.7	31.0
All other	8.6	6.2	5.7	11.9
Total	224.7	160.1	144.1	130.0

Per Person Per Day Spending by Type of Accommodation

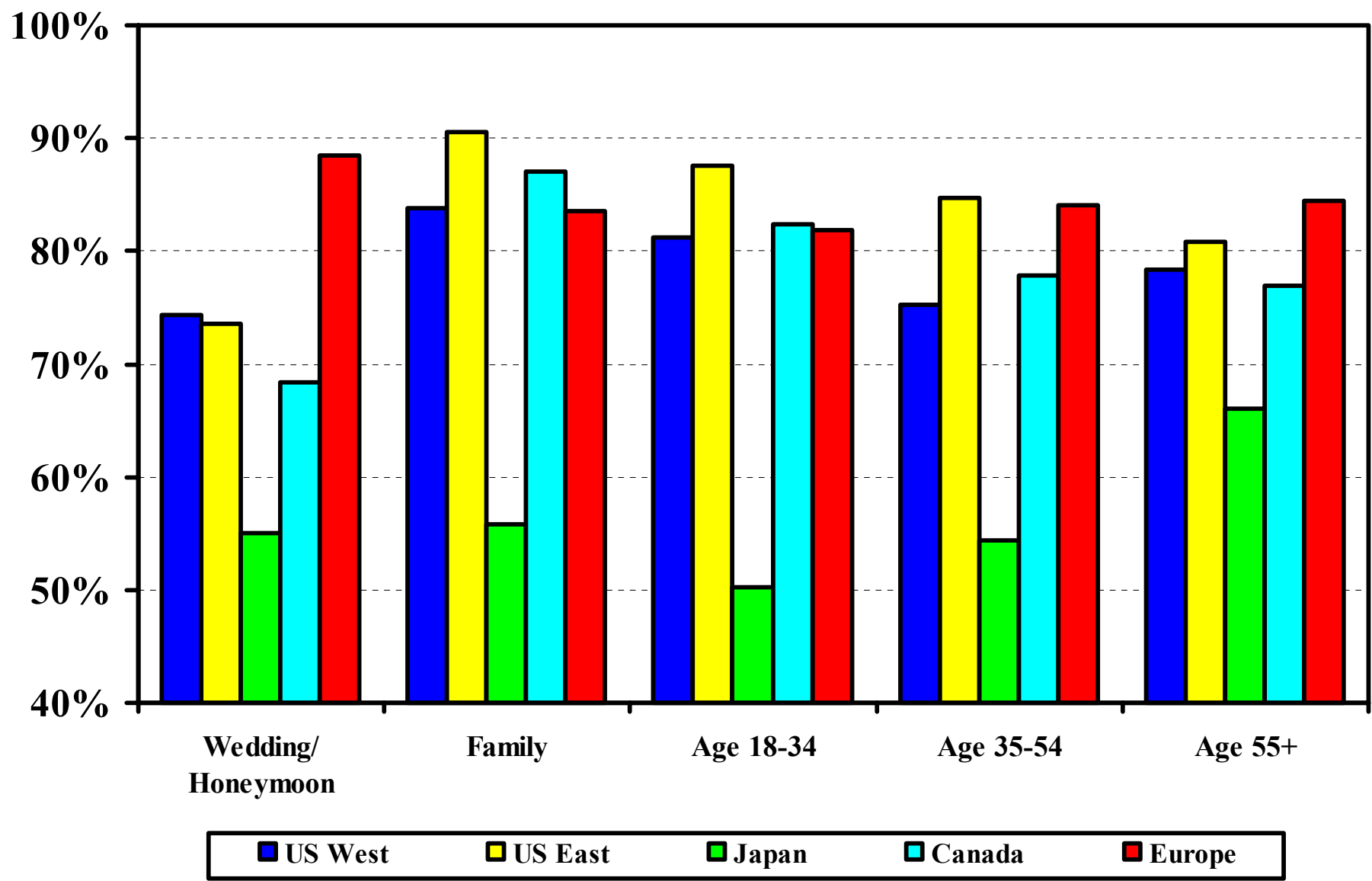
Japan

Expenditures	Hotel	Condo	B&B	Timeshare
All Food in Hawaii	43.3	26.0	31.5	22.9
Entertainment & Recreation	18.5	11.2	20.2	14.1
Transportation	12.7	12.7	21.8	13.6
Total Shopping	95.9	47.9	37.9	44.0
Lodging	64.4	48.8	61.4	21.7
All other	19.2	6.5	6.6	5.1
Total	254.2	153.3	179.3	121.4

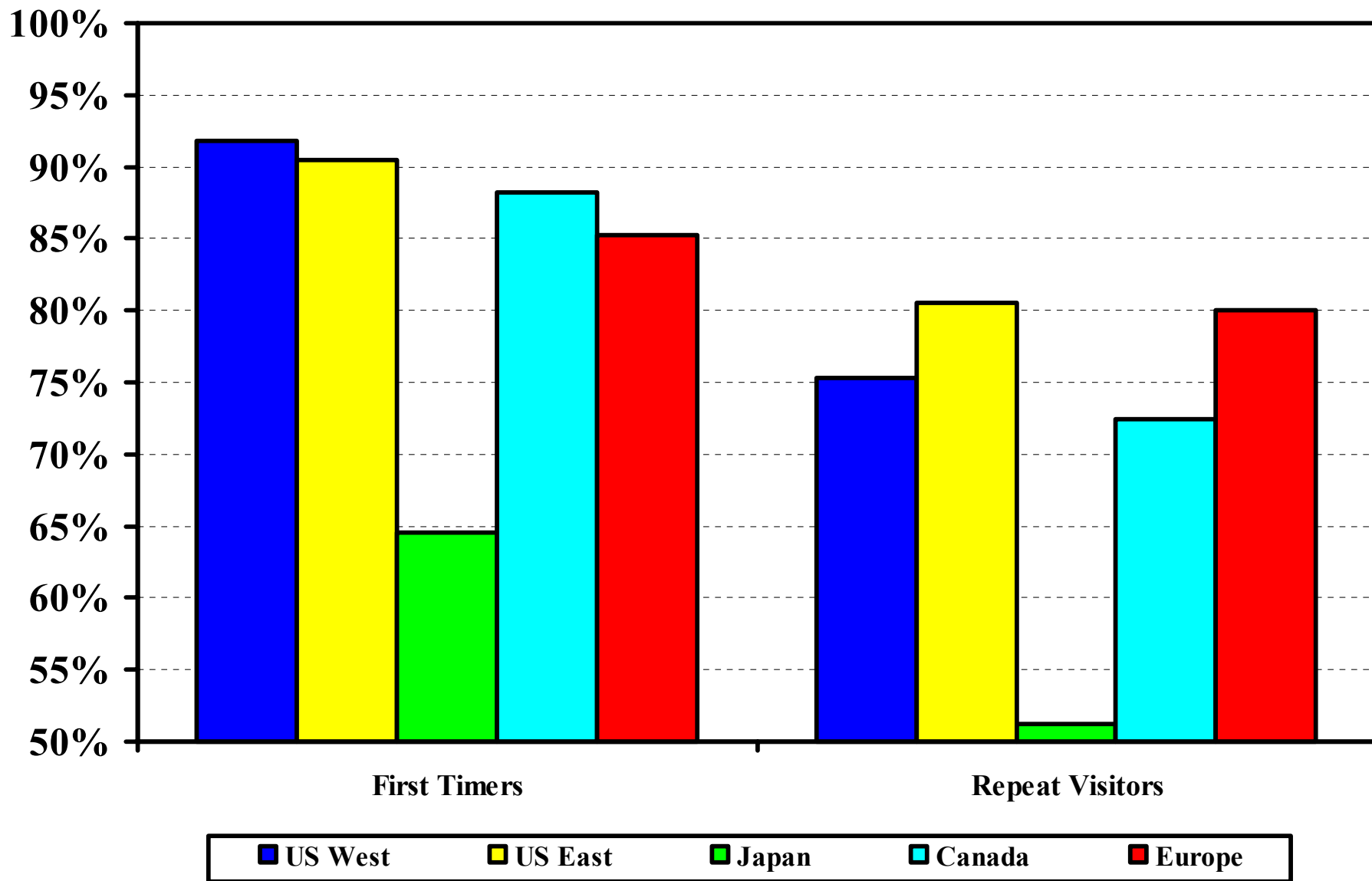
Activities by Island, U.S. West, U.S. East, and Japan

Activity Participation %	State	Oahu	Kauai	Maui	Big Island
US West: Sightseeing	90.5	86.3	95.7	92.2	92.4
US West: Entertainment	83.2	76.9	77.9	82.7	66.8
US West: Shopping	94.9	92.8	87.3	91.2	87.2
US East: Sightseeing	93.4	88.3	94.3	93.4	93.9
US East: Entertainment	85.1	77.3	66.8	77.5	57.1
US East: Shopping	94.7	89.4	52.3	87.5	72.3
Japan: Sightseeing	94.0	91.8	94.8	90.8	93.1
Japan: Entertainment	89.6	89.2	43.4	57.7	58.5
Japan: Shopping	98.5	99.1	34.7	59.1	53.1

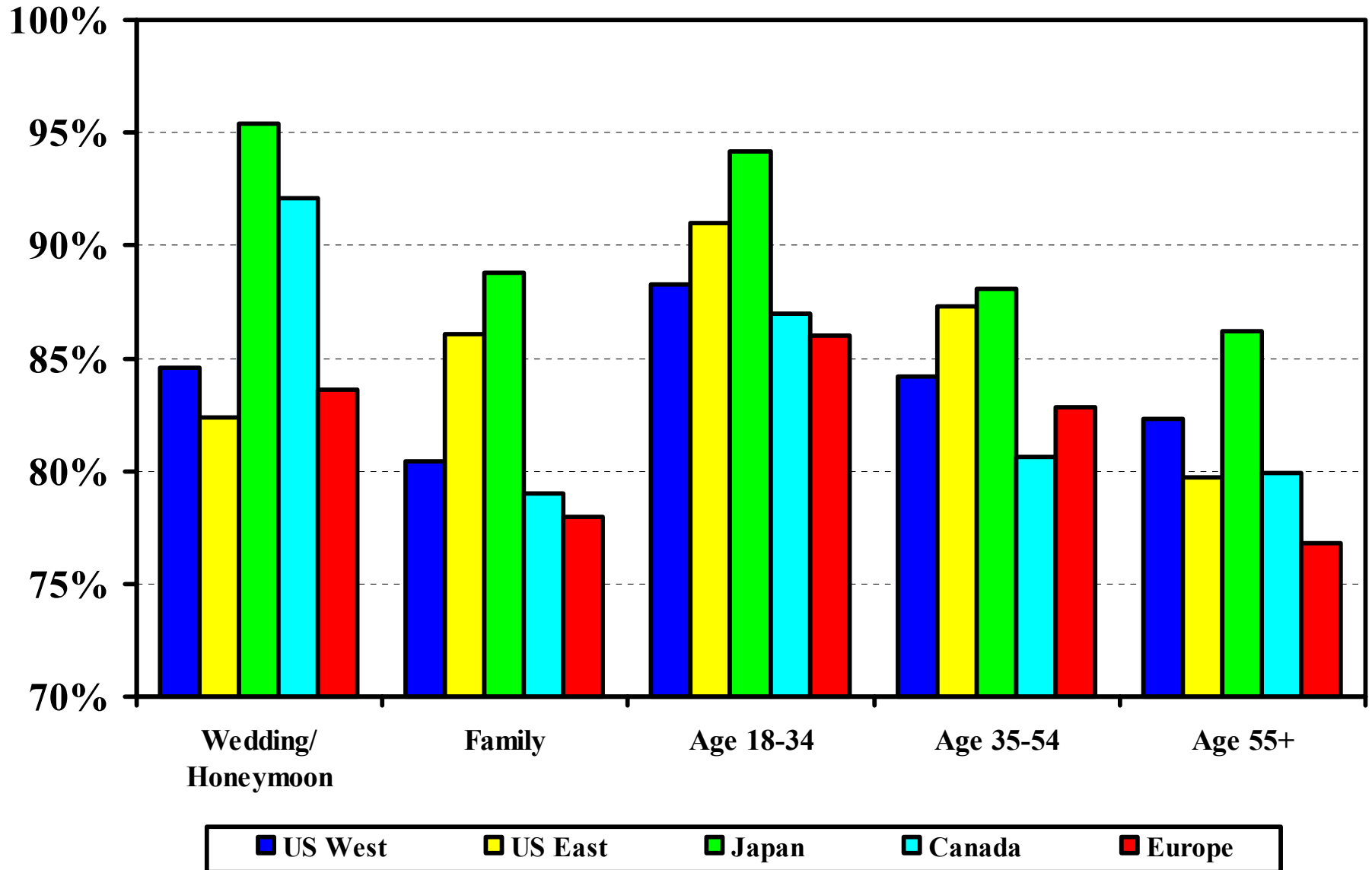
Culture Participants by MMA and Life Stage, 2003



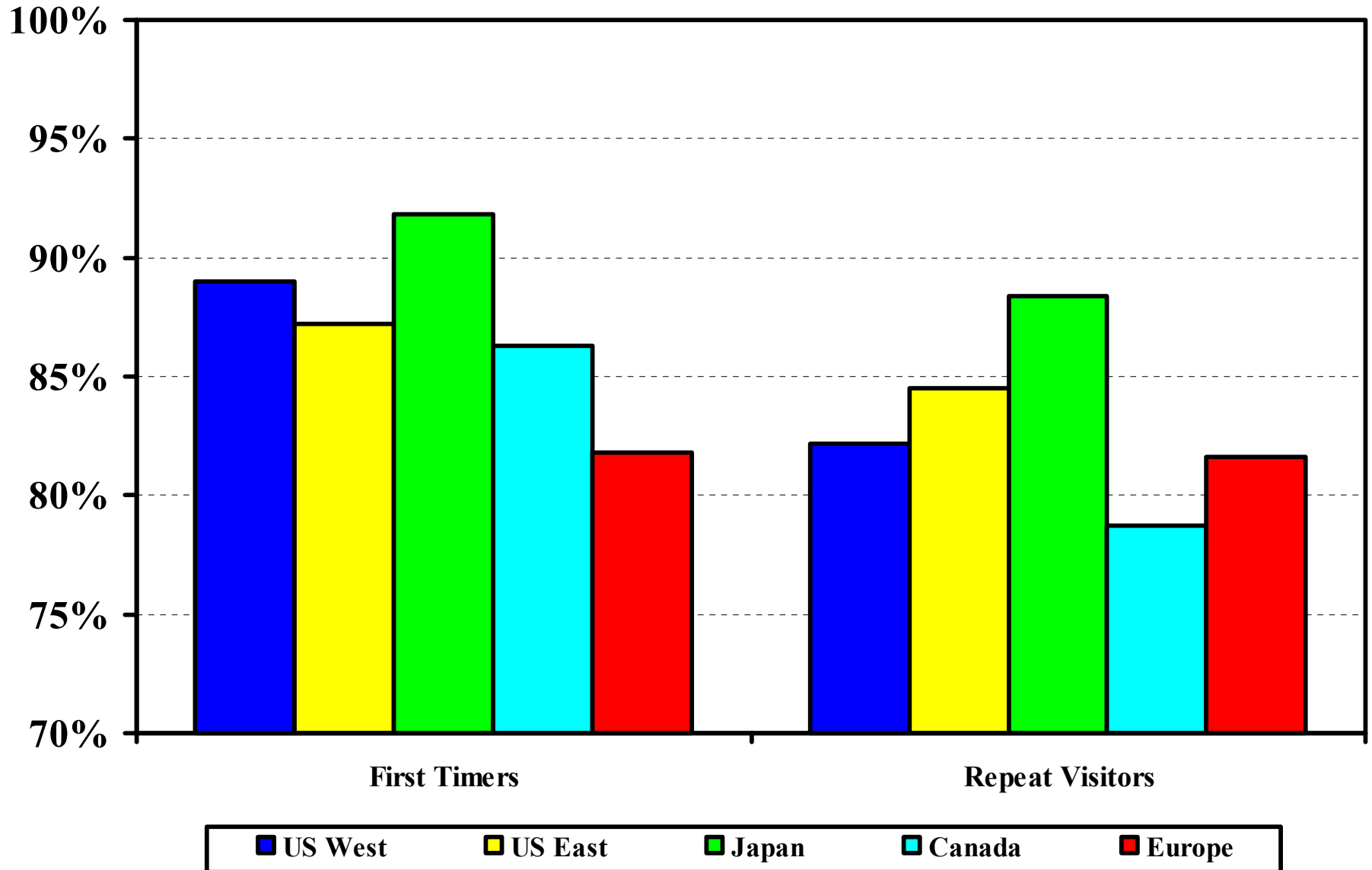
Culture Participants by MMA and Frequency of Trip, 2003



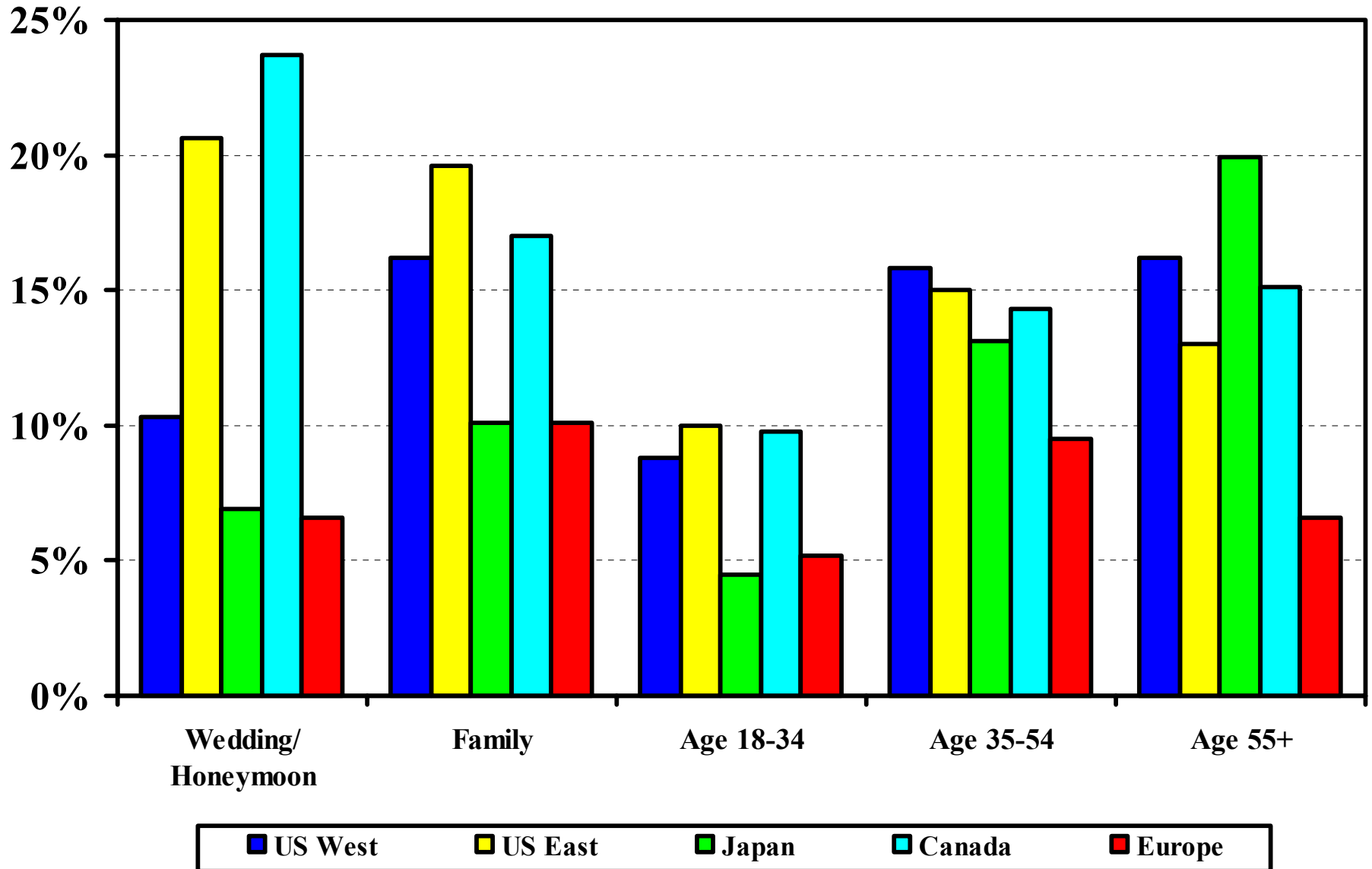
Entertainment Participants by MMA and Life Stage, 2003



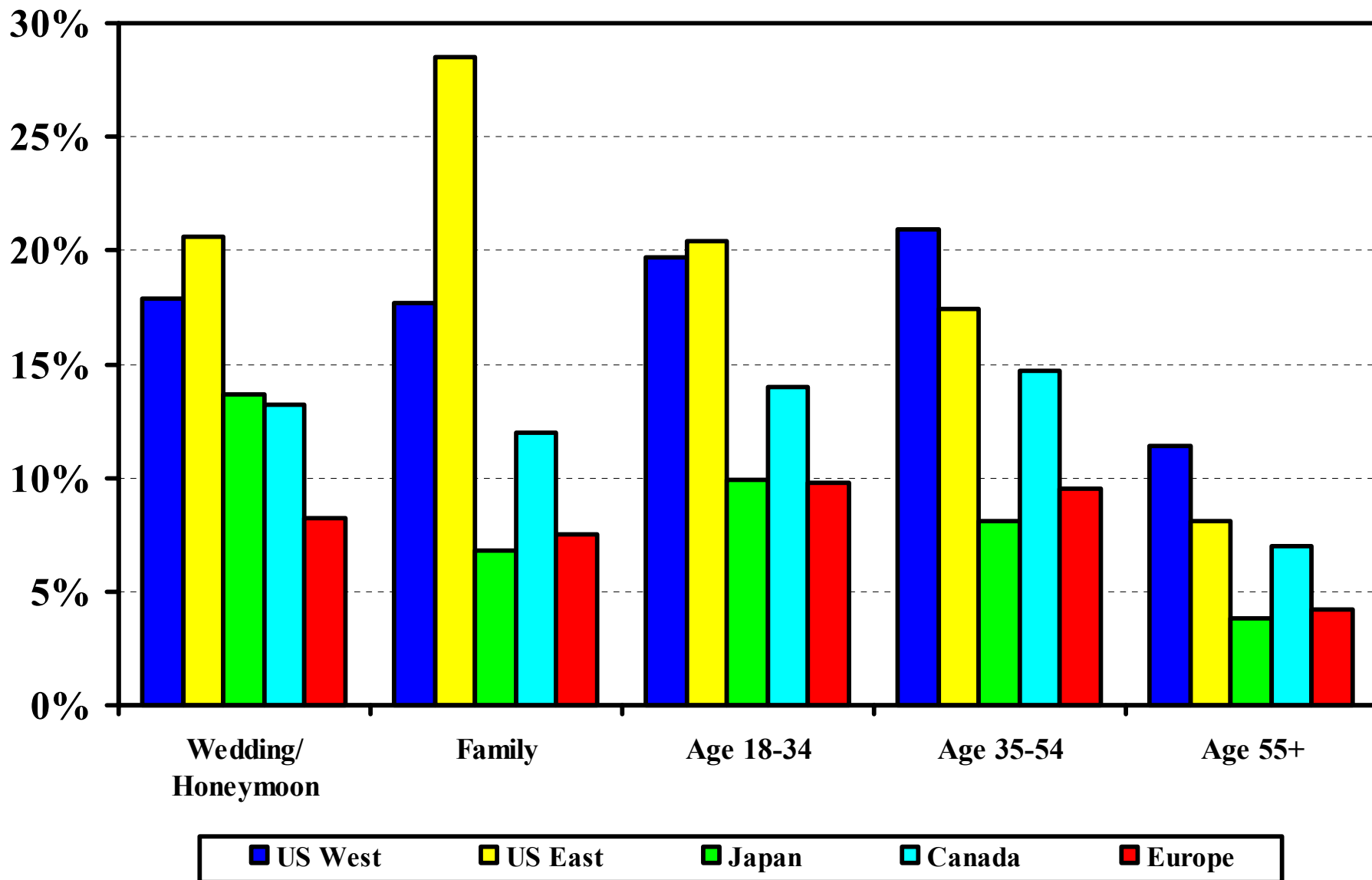
Entertainment Participants by MMA and Frequency of Trip, 2003



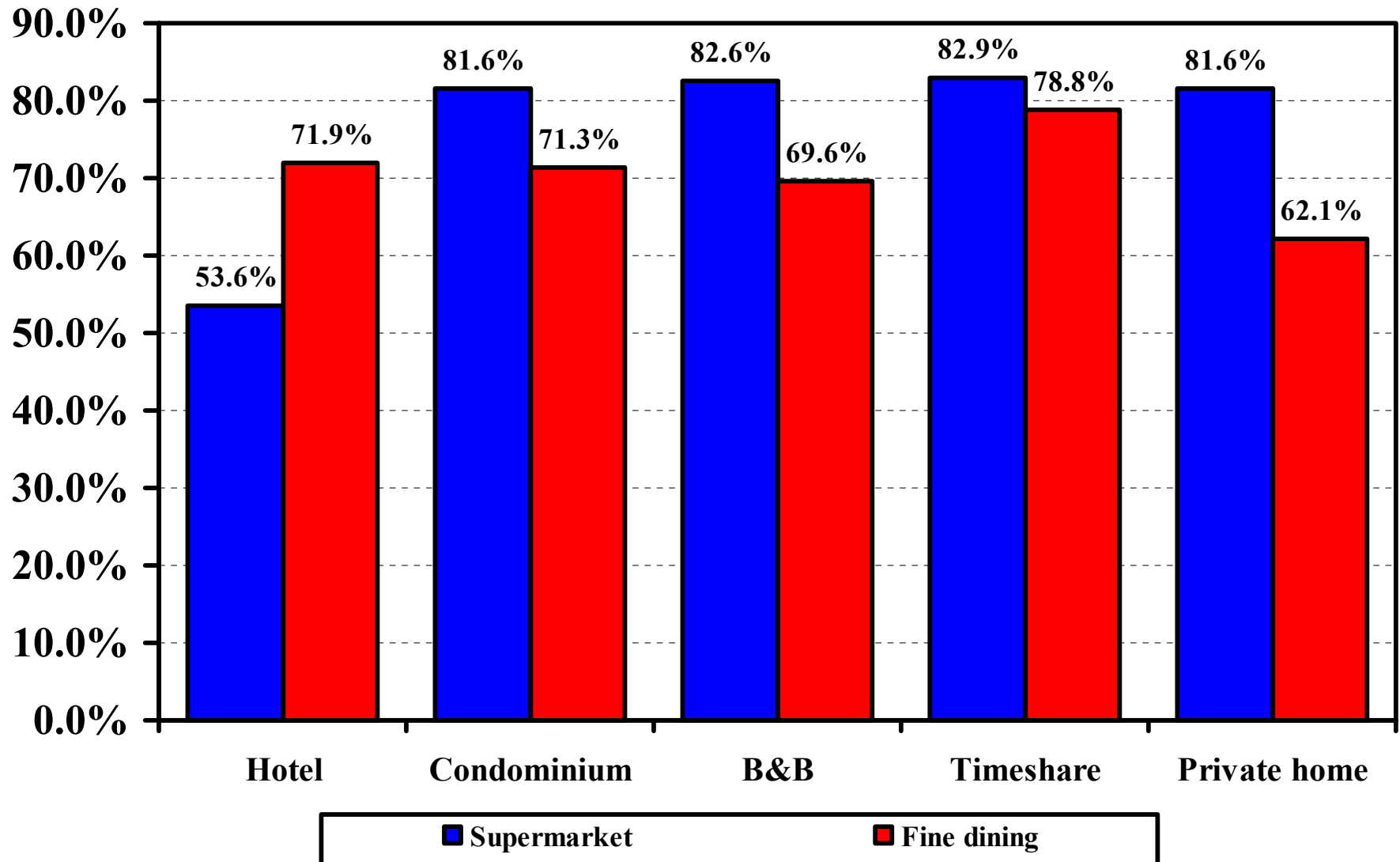
Golf Participants by MMA and Life Stage, 2003



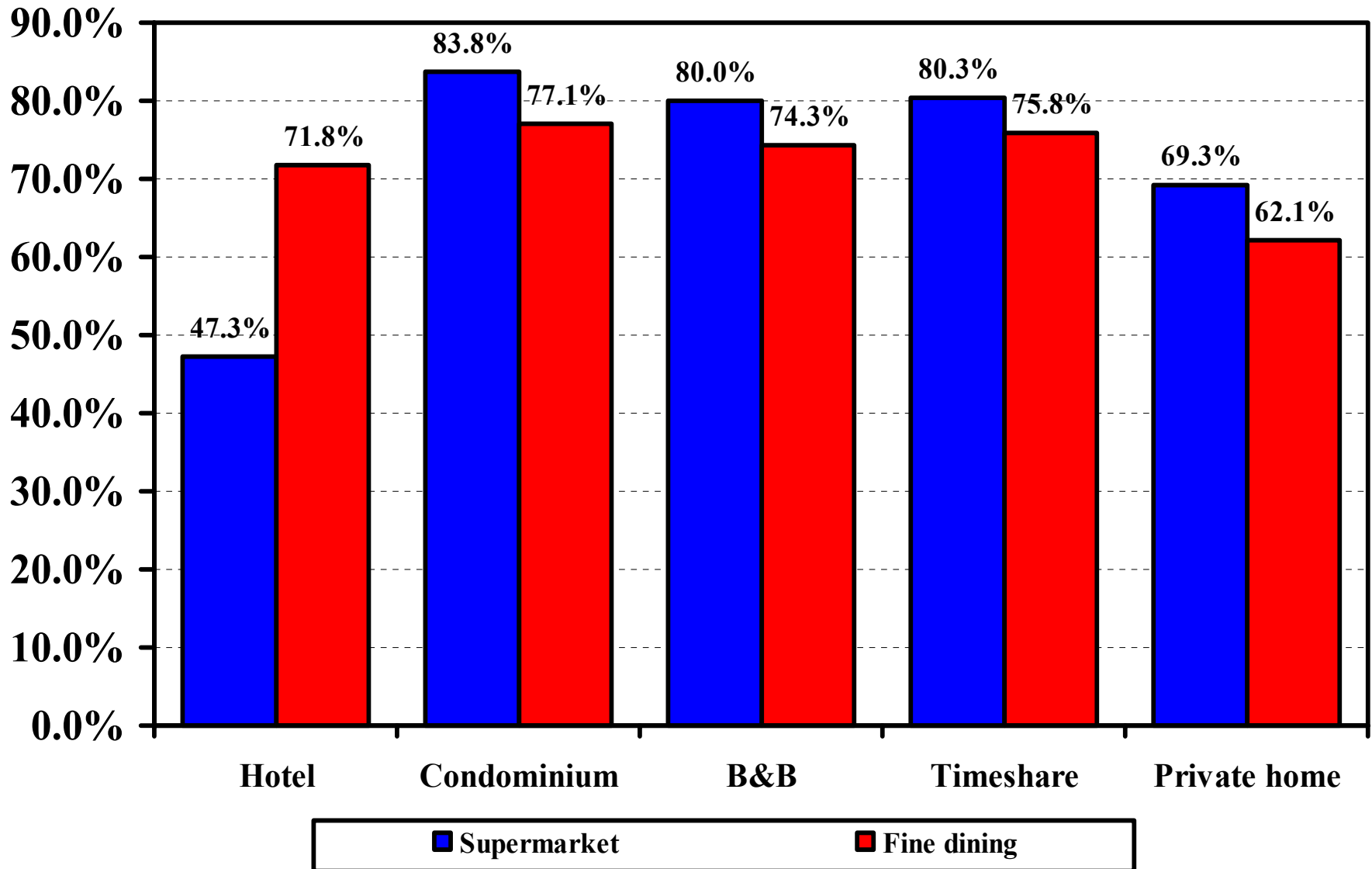
Gym and Health Spa Participants by MMA and Life Stage, 2003



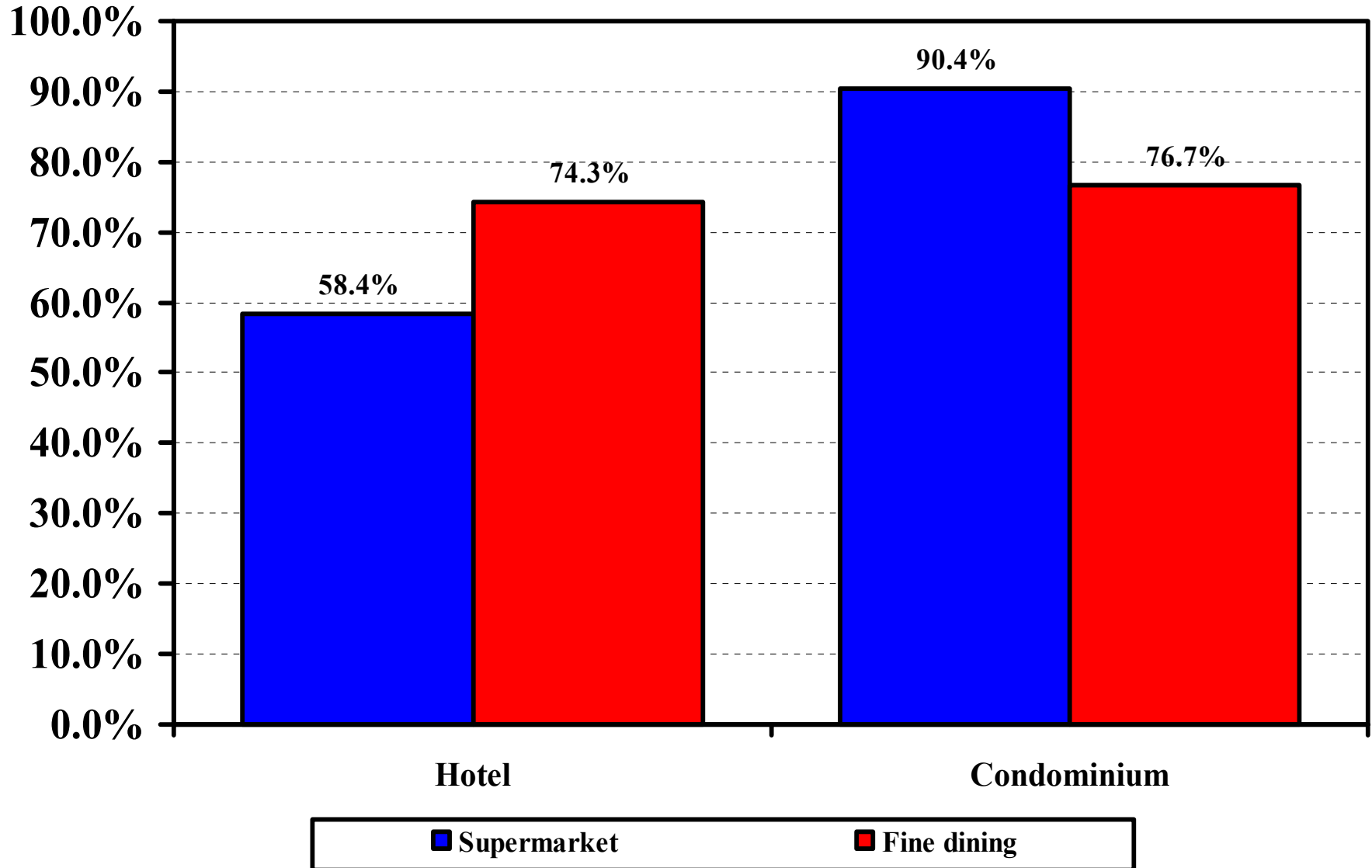
U.S. West: Went to Supermarket or Fine Dining by Accommodation, 2003



U.S. East: Went to Supermarket or Fine Dining by Accommodation, 2003



Japan: Went to Supermarket or Fine Dining by Accommodation, 2003



research & economic analysis division

The Research and Economic Analysis Division (READ) conducts research and analysis on trends, issues and policies affecting Hawaii's economy; and collects and interprets statistics on all aspects of business activity, including the visitor industry, the demography, and the economy of the State.



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